Environmental Health and Safety Data Management System (EHSDMS)

Quick Reference Guides

Version 11

Powered and Delivered by
Ex3®

Environmental Health and Safety Data Management System

EHSDMS Quick Reference Guides

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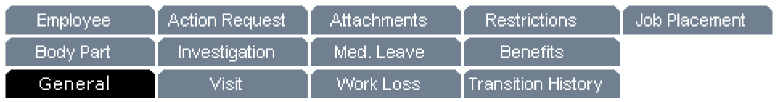
Menu Options

Case: New	• Create a new incident record. • Save initial "General" screen and additional tabs appear.
Case: Find	• Search system for existing case record. • Select case record and "General" screen will appear with tabs.



Tabs	**Tab Functions** ***(Tab visibility based on user role.)***
General	• Records the "who, what, when, and where" of the incident. • Changes to "Case Type" are saved here and are tracked on the Transition History tab. • Tracks the date of last revision. • Notify Safety personnel, the employee's Supervisor and Medical personnel of the incident using buttons at the screen.
Visit	Use the five Visit sub tabs to record information on each of the employee's visits to a clinic for a single injury or illness. **Information:** • Tracks follow-ups to a previous incident record and their parent records. **Diagnosis:** • Tracks all diagnoses given related to the incident. • Make a specific diagnosis primary. **Notes:** • Enter and review notes for each visit. • **Save Final** button makes a note read-only. It may not be modified in any way. **Treatment:** • Record all treatments given or prescribed for each visit of a case. **Vitals:** • Record an employee's vitals at the time of his visit to the clinic.
Work Loss	• Tracks and calculates actual days of work that were lost or restricted due to an injury or illness. • Calculations on this page fulfill requirements for the OSHA 200 series of reports. • A restriction and subsequent job placement must be in place for the Restricted Days calculations to fill.
Transition History	• Lists all changes to the General screen's "Case Type" field. • Displays the old and new case type, reason for change, effective date and person who created change. • All fields are read only.

Menu Options

Tabs	Tab Functions
Body Part	• Specify which of the employee's body parts have been affected by the injury or illness. • Make a single injury primary if more than one body part was affected using the **Make Primary** button.
Med. Leave	• Records details of an employee's medical leave from work. • These days will appear on the Work Loss tab.
Employee	• Provides access to the employee's personnel information for viewing and updating. Changes to this screen affect only this case record.
Job Placement	• Track any temporary placements that are made for the employee to accommodate a work restriction. • Once a job placement is made, the Restricted Days calculation field should fill.
Investigation	Use the eight Investigation sub tabs to record information collected during the course of investigating an incident **General** • Record all general investigation information, including the cause of the injury or illness, actions taken and investigation results. • Some fields may be filled in automatically if a supervisor has completed a SIR form for this case. **Detail** • Records what was happening at the time of the incident as well as what initial treatment was given. **Factors** • Assign factors that may have contributed to this specific case. More than one factor may be assigned. • Some factors may already have been assigned if a supervisor has completed a SIR form for this case. **Notes** • Records all investigation notes related to this specific case. • **Save Final** button makes a note read only. It may not be modified in any way. **OSHA** • Record information needed for OSHA reporting on this tab. • Some fields may already be filled if a supervisor has completed a SIR form for this case. **Action** • Assign human actions that contributed to the incident. • More than one action may be assigned. **Equipment** • Identify all equipment, regardless of damage, involved in the incident. • Equipment is anything involved in the incident from staplers to automobiles. **Condition** • Assign working conditions that contributed to the incident. • More than one condition may be assigned.

Menu Options

Tabs	Tab Functions
Benefits	Use the three Benefits sub tabs to record information regarding an employee's claim for disability or other compensation. **Eligibility** • Records general claim information as well as specific details depending on the type of claim: worker's compensation, short-term disability, and long-term disability. • Use the **Notify HR** button to send a notification to the HR department regarding claim. **Payments** • Records all monetary compensation to employees disabled by injury or illness. **Correspondence** • Records all documents that have been sent to the employee, important dates and confirmation numbers.
Action Request	• Create, Distribute or Re Assign action requests related to this incident. • Send overdue messages for action requests you have assigned to others.
Attachments	• Stores electronic copies of any document related to the incident such as accident pictures, forms, and medical reports. • Select "yes" in the "Apply Privacy Act?" field to ensure privacy of medical records when necessary.
Restrictions	• List all restrictions assigned to an employee as the result of this injury or illness. • Restricted Days calculation will not change unless this restriction results in a job placement.

Visit: New	• Create additional visits for an existing injury/illness case.
Visit:Find	• Locate an existing visit record to review or update.
My SIR	• Supervisors can view all injury/illness cases associated with their employees. • Information added and saved to screen will automatically update the original case record.
Reports	• Create various Injury/Illness reports based on specified search criteria. • Install Crystal Smart Viewer.

Menu Options

Create

- Create a new “General” action request.
- Action Requests related to a specific incident are created in either the Injury/Illness or Safety modules.
- **Attach** button attaches relevant documents to the action request.
- Select **Notify Only** to send out email notification of action request
- Select **Create AR** to create a primary action request which sends recipent the action request number along with the brief and detailed text.
- Use the following buttons to select owner(s) of the action request:

Button	Button Function
Add From List	• Select a distribution list for this action request.
Add Employee	• Add individual names, using find employee screen, to the “AR Assigned To:” field.
Delete All	• Delete all names in the “AR Assigned To:” field.
Delete Employee	• Delete individual names from “AR Assigned To:” field.

Manage

- Allows user to view and update all Action Requests that have been assigned to them or they have assigned to others.
- Each Action Request has a link to parent case that allows users to open incident record associated with the Action Request.
- **Search Filter** button allows users to view a specific list of action requests based on their search criteria.
- Use the following buttons to further manage the action request:

Button	Button Function
Delete	• Erase un-necessary action requests
Distribute	• Assign action request received to others for completion
Send Overdue Message	• Send reminder for outstanding action requests
Re-Assign	• Assign action request to another owner

Dist List

- Create distribution lists for use when sending out action requests or other emails
- Make lists for either public or private use.
- Copy existing list and then edit it into a new list.

Reports

- Create various safety reports based on specified search criteria.
- Install Crystal Smart Viewer

Menu Options

New	• Create a new incident record. • Save initial "General" screen and additional tabs appear.
Find	• Search system for existing record. • Select record and "General" screen will appear with tabs.

<u>**Tabs**</u>	<u>**Tab Functions**</u> **(Tab visibility based on user role)**
General	• Records the " what, when, and where" of the incident. • Type brief and detailed descriptions of the incident.
Associations	Use the 3 sub tabs to collect data relevant to the incident. **Equipment:** • Record all equipment involved in incident regardless of damage. • Damaged equipment would also be listed on the Property tab. **Factors:** • Assign contributing factors for an incident using a predefined list. **Witness:** • Input contact information and statements from people who witnessed the incident.
Investigation Notes	• Allows investigators to create a log of notes related to the incident. • Only the person who entered the note may edit it. • **Save Final** button makes a note read only.
Injury/Illness	• Associate injury/illness records with the safety incident.
Investigators	• Create investigation team for incident. • Assign primary investigator as well as investigation and reporting type.
Property	• Record all damage incurred to property involved in incident.
Vehicle	• Record damage to any vehicles involved in incident. • Records estimate, actual cost and any relative details and remarks.

Menu Options

Tabs	Tab Functions (Tab visibility based of user role)
Details	Use the 2 sub tabs to collect a variety of data related to incident. **Factors** • Input contacts for incident such as key contact and safety manager. • Assign primary root cause, actual severity and probability. Risk Assessment Code (RAC) displays. • Complete list of “Yes/No” indicators for incident, such as “Close Call Indicator”. **Category Specific** • Administrators may create new fields to capture information for a specific category. This new information would be collected here. • Information will not appear in reports.
Lesson Learned	• Records final outcome of investigation. Lessons learned text may be added to as often as necessary.
Action Request	• Create, Distribute or Re Assign action requests related to this incident. • Send overdue messages for action request you have assigned to others.
Attachments	• Attach electronic or scanned documents directly to record. • System saves copy of document to server.
Mail Tab	• Notify employees via email of incident • Sender is cc: on all emails sent.

Reports

- Create various safety reports based on specified search criteria.
- Install Crystal Smart Viewer

Quick Reference Guide: Employee, Headcount, Administration and General Modules

Module	Menu Options	
Employee	**New**	• Create a new employee record.
	Find	• Locate existing employee record to review or edit. • Changes to record affect all <u>future</u> incident records for this employee.
Headcount	**Manage**	• Input man-hours and other attendant data.
Administration	**Ref. Table Maint.**	• Allows an administrator to review and maintain all approved reference tables. • Apply Filter button allows user to limit or isolate select information within the selected table.
	Manage Contracts	• Allows an administrator to review and update all contractor information. • Record various contracts for a given contractor. • Record contract number, SIC and NAICS codes
	Manage Users: New	• Allows an administrator to add users to the system. • Find an employee, using the "Find Employee" screen, to add to the user's list. • User tabs appear once employee is added to user list.
	Manager Users: Find	• Search system for existing system user. • User tabs appear once employee is selected.
	Sync Employees	• Search the system for orphaned legacy cases. • Sync legacy cases to current employee

<u>User Tabs</u>	<u>Tab Functions</u>
Roles	• Assign user roles using a predefined list. • Users may have more than one role.
Sites	• Assign user's sites using a pre-defined list • Users may have more than one site.
Organizations	• Assign user's organizations using a pre-defined list. • Users may have more than one organization.
Contractor	• Appears only if user is a contractor. • Assign user to a contractor.

Modules	Menu Options	
General	**Home**	• Return to the homepage.
	My Permissions	• View roles, sites, organizations and clinics assigned to logged on user.
	Change Password	• Change logged on user’s password. **<u>Password Requirements</u>** • Passwords must contain at least one lowercase letter. • Passwords must contain at least one uppercase letter. • Passwords must contain at least one number. • Passwords must contain one of the following characters: ~, !, @, #, %, &, _, <, > • Passwords must be between 8 and 25 characters.
	Logout	• Logout of the system after each use to minimize to the possibility of unauthorized use. • Returns to login screen.